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ABSTRACT

During the 1970s direct phonics instruction was the preferred method of reading instruction. In the 1980s the whole language concept caught on and phonics instruction was considered defunct. In the 1990s the pendulum, in the process of swinging back, was intercepted before it went to the extreme of "all phonics," by a balanced approach to reading instruction. Even though there has been an increased emphasis on explicit phonics instruction in recent years, research continues to indicate the benefits of a balanced approach to reading instruction. This Topical Bibliography and Commentary reviews recent research on balanced instruction, concluding that combining phonics/basic skills with whole language into a balanced approach may permit more students to experience reading and writing success. (Contains 3 Internet addresses and 11 references.) (NKA)

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The Use of "Balanced Instruction" in Language Arts Curriculum

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Introduction

There seems to be a pendulum-effect attitude in the field of education that sways from one extreme to the other whenever a new teaching method is introduced. During the 1970's, direct-phonics instruction was the preferred method. However, national and state reports indicated that a majority of elementary school children were not reading at basic levels. In response to this reading crisis, the whole language concept caught on during the 1980's and phonics instruction was considered defunct. Perhaps predictably, the lack of rousing success with this new approach caused some educators to call for a return to the older, "better" ways. In the 1990's, the pendulum in the process of swinging back was intercepted, before it went to the extreme of "all phonics," by a balanced approach to reading instruction. Even though there has been an increased emphasis on explicit phonics in reading instruction in recent years, research continues to indicate the benefits of a balanced approach to reading instruction (Farstrup & Samuels, 2002; Guthrie, Schafer, & Huang, 2001).

Studies Supporting the Implementation of "Balanced Instruction"

Baumann and Ivey (1997) conducted a study among second graders in Georgia to determine what children learn about reading, writing, and literature through a yearlong program of strategy instruction integrated within a rich, literature-based environment. Content analysis revealed that "the immersion in literature and the embedded strategy instruction created a kind of symbiotic, synergistic relationship in which each program characteristic contributed to and fed off the other. In other words, the literature enhanced students' reading and writing fluency, and their developing literacy abilities promoted their literary knowledge and appreciation. This occurred within a complex, multifaceted, interactive environment involving the children, their teacher, and the curricular and instructional program." (p. 54).

Between 1992 and 1994, the performance of North Carolina fourth-graders on the National Assessment of Educational Progress reading test suggested that the North Carolina schools, like those in most other states, were failing to teach many children to read at acceptable levels. 41 percent of these students were reading below the basic fourth-grade competency level. In the spring of 1995, legislation was introduced in the North Carolina General Assembly that called for "the implementation of balanced, integrated and effective programs of reading instruction." Denton (1998) states that it had "become clear that neither drill-and-kill phonics nor a pure whole-language program can meet the needs of all children...What those at the poles of opinion in both camps have failed to recognize is that while on the one hand the research shows that phonics is an essential part of any effective reading program (and that some children will master the necessary skills only through direct instruction), on the other it also confirms that phonics is only a part of a good reading program. A reading program that holds out phonics as the only way to teach reading is no more a complete reading program than a whole language approach that fails to address phonics." (pp. 3-4). In a recent study Angelis, (2002)

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reiterated the need to go beyond viewing learning to read as just a process of complex skills and the ability to decode text and discussed the need to understand the role of a child's existing and developing vocabulary, the functional aspect of reading, and the contextual framework within which reading occurs.

In January 1997, the state Board of Education and the Department of Public Instruction formally adopted a plan that clearly states what is meant by a balanced reading approach: "Efficient early instruction contains a balance of activities and strategies to improve word recognition, including phonics instruction, reading, meaningful text, writing and spelling activities." The North Carolina plan also emphasizes the need for both preservice and inservice professional development if the proposed curriculum changes are to be implemented effectively. Denton (1998) quotes further from the plan that, "In teacher education programs, additional competencies specifically addressing the role of phonics in reading are needed. Field or clinical experiences in reading are needed for elementary teachers. Existing elementary teachers need additional training in incorporating phonics into a balanced reading approach." (p. 6). Accordingly, the North Carolina Standard Course of Study for English Language Arts has been revised to provide detailed guidance on how to teach phonemic awareness and other word-recognition skills within the context of a literature-based reading program. At the same time, the grade-level benchmarks developed by the department to assess children's reading and writing progress have been revised to reflect the curriculum changes.

Lavadenz (1996) describes the necessity of implementing balanced Language Arts instruction this way: "Despite the recent backlash to whole language and the widespread misconceptions regarding the teaching of phonics and basic skills within a whole language context, the goals and principles of developing lifelong and participatory readers and citizens remain the most compelling overriding call to literary instruction in the United States today." (p. 2). The California Language Arts Framework (1987) included a call for Language Arts instruction that promotes a love of reading through a sense of personal fulfillment, a sense of effectiveness through which students acquire a range of lifelong learning strategies that foster full participation in the world of work and the access to knowledge in a democratic society. Lavadenz (1996) says that in order to "foster this love of reading, which ultimately fulfills the goals of the L.A. Framework, students must be given the opportunity to actually read... Materials and activities which reflect the real world and whose use can be extended into the lives of children after they leave the classroom are and should be included in the daily instructional practices of literacy classrooms. Fundamental to literacy instruction is the inclusion of authentic reading materials and writing activities, which include the use of literature, trade books, comic books, newspapers and encouraging writing through journals, story writing, etc." (pp. 4-5).

The California State Department of Education (1995) has issued a report summarizing the findings of the Reading Task Force created by the State Superintendent of Public Instruction. The Task Force members were unanimous in their conviction that reading is the most important academic skill and the foundation for all academic learning. The Task Force concluded that the 1987 English-Language Arts Framework did not present a comprehensive and balanced reading program and gave insufficient attention to a systematic skills instruction program. The Task Force also concluded that teacher education and inservice training must be redesigned, with a greater emphasis on beginning reading. Public schools and teacher-training institutions need to increase their collaborative efforts to improve the preparation of teachers. The Task Force determined that a balanced approach to reading "must have: (1) a strong literature, language, and comprehension program that includes phonemic awareness (sounds in words), phonics, and decoding skills to address the needs of the emergent reader: (3) ongoing diagnosis that informs teaching and assessment that ensures accountability: and (4) a powerful early intervention program that provides individual tutoring for children at risk or reading failure." (p. 10).

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Recommended Instructional Procedures

Pressley (2002) and Baumann and Ivey (1997) indicate that a balanced approach to Language Arts instruction involves a curricular balance between literature and instructional activities. As Baumann and Ivey (1997) states, "Our conception of curriculum balance involves a similar view: that instruction within the context of literature is an effective and efficient way to provide students skills and strategies in reading and writing." (p. 2). While recognizing that there are multiple models for accomplishing the objective of creating a nation of better readers, they argue that "the framework that seeks to balance literature environment with contextualized skill/strategy instruction in the curriculum dimension and teacher-initiated and responsive teaching in the instruction dimension has utility for describing and explaining...the efficacy of teaching students reading and language arts strategies within a literature-based environment" (p. 45).

Mucelli (1997) describes the balanced instruction techniques brought to a classroom by a teacher who had been trained in Reading Recovery, noting that all but one student currently read at or above grade level. The Reading Recovery program incorporates the balanced reading components which include phonics, phonemics, improving reading comprehension and independent reading of good books.

Lavadenz (1996) makes the following recommendations to ensure balanced Language Arts instruction:

1. Language (literacy) classes should be learner centered (with the teacher viewed as a potential learner as well);
2. Language is best learned when kept whole;
3. Language instruction should employ all four modes—listening, speaking, reading and writing;
4. Language in the classroom should be meaningful and functional;
5. Language is learned through social interaction; and
6. language is learned when teachers have faith in learners. (p. 7)

Lavadenz (1996) also recommends that "funds should be utilized to implement staff development at school sites; the primary goal of staff development should center around the use of authentic reading and writing experiences in classrooms. Expert consultants who espouse the holistic viewpoint can be contracted on long-term bases, the purpose being to assist in the development of authentic language use in the classrooms over time. An integral component of professional development should be how to incorporate appropriate reading skills and strategies within the holistic paradigm...Funds should be utilized to purchase trade books and other authentic sources of reading including literature and newspapers." (p. 7).

Conclusion

The challenge to parents, teachers, school board members, teacher-training institutions, and state legislatures is to recognize the fundamental importance of reading and to support actions that deliver effective, successful reading instruction to every child. The challenge is not to make a choice between teaching reading through either phonics or whole language. Neither instructional model can meet the needs of all children. The challenge is to confirm the research that indicates its effectiveness. Denton (1998) drives this point home, stating "...policymakers in all states should seek to walk the fine line between the more single-minded positions on either side of the reading debate to promote an approach that is based on strong evidence of effectiveness. That means a balanced approach...(which) will require being able to assess accurately each child's instructional needs. It also means providing enough resources so that teachers can receive the training and support they need to understand what balance means and can attain the skills necessary to do it." (p. 7). In a paper presented at the annual conference of the International Reading Association, Bercik (2001) emphasized the need for teacher education institutions to provide guidance and support to teachers on how they can implement balanced reading instruction in their classrooms despite the constraining mandates of testing programs in all school districts. Staying the course with this new, balanced approach for long enough to give it a chance to show positive results is necessary to break the pattern of a pendulum swinging periodically from one extreme to the other. Combining phonics/basic skills with whole language into a balanced approach may permit more students to experience reading and writing success.

Internet Resources

*Balanced Reading Instruction. (An ERIC Digest)
http://www.indiana.edu/~eric_rec/ieo/digests/d144.html

*Balanced Reading Instruction ((An ERIC Bibliography)
http://eric.indiana.edu/ieo/bibs/balanced.html

*Resources on Balanced Reading Instruction from North Central Regional Educational Laboratory
http://www.ncrel.org/sdrs/timely/britoc.htm

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